



# Montana Secretary of State Linda McCulloch

# Statewide Petitions

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The Basics of Receiving,  
Reviewing, Processing and  
Certifying Statewide Petitions



# Processing Petitions

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- For a step-by-step walk through on setting up and processing statewide petitions in MT Votes and sending them to the SOS office, go to the website: <http://sos.mt.gov/Elections/Officials>.



# Receiving Petitions

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- Every sheet or section of up to 25 petition sheets submitted together must be accompanied by a signature gatherer affidavit.
- If affidavits are submitted at the bottom of a pile of petition sheets, contact the sponsor or signature gatherer to have them sort them out.
- You do not have to sort out which petitions belong with which signature gatherer – this is the responsibility of the sponsor and signature gatherer.



## Affidavit of Petition Signature Gatherer

An affidavit must be attached to each sheet or section submitted to the election administrator. Separate sheets of a petition may be fastened to this affidavit in sections of not more than 25 sheets.

AFFIDAVIT FILED WITH ELECTION ADMINISTRATOR

I, \_\_\_\_\_  
(printed name of person who is the signature gatherer)

swear that I gathered the signatures on the petition to which this affidavit is attached on the stated dates, that I believe the signatures on the petition are genuine, are the signatures of the persons whose names they purport to be, and are the signatures of Montana electors who are registered at the address or have the telephone number following the person's signature, and that the signers knew the contents of the petition before signing the petition.

\_\_\_\_\_  
Date on which the first signature **attached** was gathered

*(Do not sign on the line below before gathering the signatures on the petition(s) that you attach to this affidavit.)*

\_\_\_\_\_  
Signature of petition signature gatherer

\_\_\_\_\_  
Address of petition signature gatherer

\_\_\_\_\_  
City, state and zip code

NOTARY OR AUTHORIZED OFFICER – DO NOT FILL OUT THIS SECTION UNTIL AFTER THE SIGNATURES GATHERED HAVE BEEN ATTACHED TO THIS AFFIDAVIT

State of Montana  
County of \_\_\_\_\_

Signed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ by \_\_\_\_\_  
*Printed Name of Signature Gatherer*

**Where to file Petition and Affidavit:**  
County Election  
Administrator's Office  
A list of county election  
offices may be found at:  
[sos.mt.gov/elections](http://sos.mt.gov/elections)

\_\_\_\_\_  
Signature of Notary or Public Official

\_\_\_\_\_  
Printed Name of Notary Public

Notary Public for the State of Montana

Residing at: \_\_\_\_\_

My commission expires: \_\_\_\_\_, 20\_\_\_\_

[SEAL/STAMP]

Updated September 6, 2013

# Affidavit of Signature Gatherer

# Sample Petition Signature Sheet

Complete Signature	Date	Residence Address or Post-Office Address or Home Telephone #	Printed Last Name and First and Middle Initials	Legislative Rep. Dist. Number	Training Note: Counted or Not?
1. <del>Gregory M. Houshouser</del>	1-7-08	0. 000000000	0. 000000000	[filled in by election office]	Not counted – all information is illegible
2. <u>Nicolas Sarkozy</u>	1-7-08	1 Champs-Élysées, Paris, France 090210	N. P. Sarkozy	[filled in by election office]	Not counted – not registered in Montana
3. G.R. Tall	1-7-08	100 South Western, Helena, MT 59601	G.R. Tall	[filled in by election office]	Counted. Even though the signature on file is <i>Gerry Tall</i> , count it if the signature, when taken as a whole, matches the one on file
4. Skip Tracy	1-7-08		S.M. Tracy	[filled in by election office]	Not counted – elector provided no residence address, PO box, or phone #.
5. G.R. Tall	1-7-08	100 South Western, Helena, MT 59601	G.R. Tall	[filled in by election office]	Not counted – attempted duplicate
6. Sherry Bobbins	1-7-08	100 Mountain Ave.	S. C. Bobbins	[filled in by election office]	Counted, even though no town listed
7. Moe White	1-7-08	100 Yellowstone Lane, Billings, MT 59101	M. A. White	[filled in by election office]	Not Counted – not registered in county indicated below
8. Ed Anders	1-7-08	100 1st, Helena, MT 59101	E. R. Anders	[filled in by election office]	Counted – even though address does not match one on file, since signature matches and there is no other reason to disqualify.

**IMPORTANT INSTRUCTIONS TO PETITION SIGNATURE GATHERERS:** (1) Note that for petitions on the Internet, the petition language and format may not be modified; (2) please collect voters' signatures from only one county per sheet; (3) note that only the signatures of registered voters qualify; (4) sign, notarize and attach an affidavit of signature gatherer to the petitions (up to 25 petition sheets, from the same county, can be attached to one affidavit); and (5) send petitions to county election administrators as soon as possible.

COUNTY Lewis and Clark

# Reviewing Signatures



■ See preceding sample petition signature sheet for examples of issues with signatures on petitions:

1. If the signature and other identifying information on the petition is illegible, the signature cannot be counted.
2. If the signer is not registered to vote in Montana, and in your county, the signature cannot be counted.
3. If, for example, the person signed their registration card with their full name, but signs the petition with initials and their last name, count it if the signature taken as a whole is sufficiently similar to the one on file.



# Reviewing Signatures (continued)

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- Additional issues with signatures on petitions . . .
  4. If the signer provides neither an address nor a telephone number (one or the other must be provided), the signature cannot be counted.
  5. If the signer has already signed the same petition (duplicate signature), the second signature cannot be counted. MT Votes will flag a duplicate signature.
  6. If the signer provides a residence address but not the city or town, you can still count the signature unless there is another reason to reject it.



# Reviewing Signatures (continued)

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- Additional issues with signatures on petitions . . .
  7. If the signer is registered in a different county than your county, the signature cannot be counted.
  8. If the address or phone number provided by the signer does not match the one on file, but the signature matches and there is no other reason to disqualify the signature, you can still count the signature.





# Reviewing Signatures (continued)

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- Check each petition signature against the signature on file.
- You should not accept a petition signature if, after your best efforts at signature verification, you believe it does not match the signature on file.



# Reviewing Signatures (continued)

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- You do **not** accept the signatures of **provisionally registered** electors, since they are not legally registered.
  1. When you check a signature, MT Votes will show provisionally registered electors, but they are flagged as provisionally registered.
  
- You **accept** the signatures of **inactive** electors, since they are legally registered.
  1. You do not automatically activate them, although you can send them a voter registration application in order to assist them in activating.



# Processing Petitions

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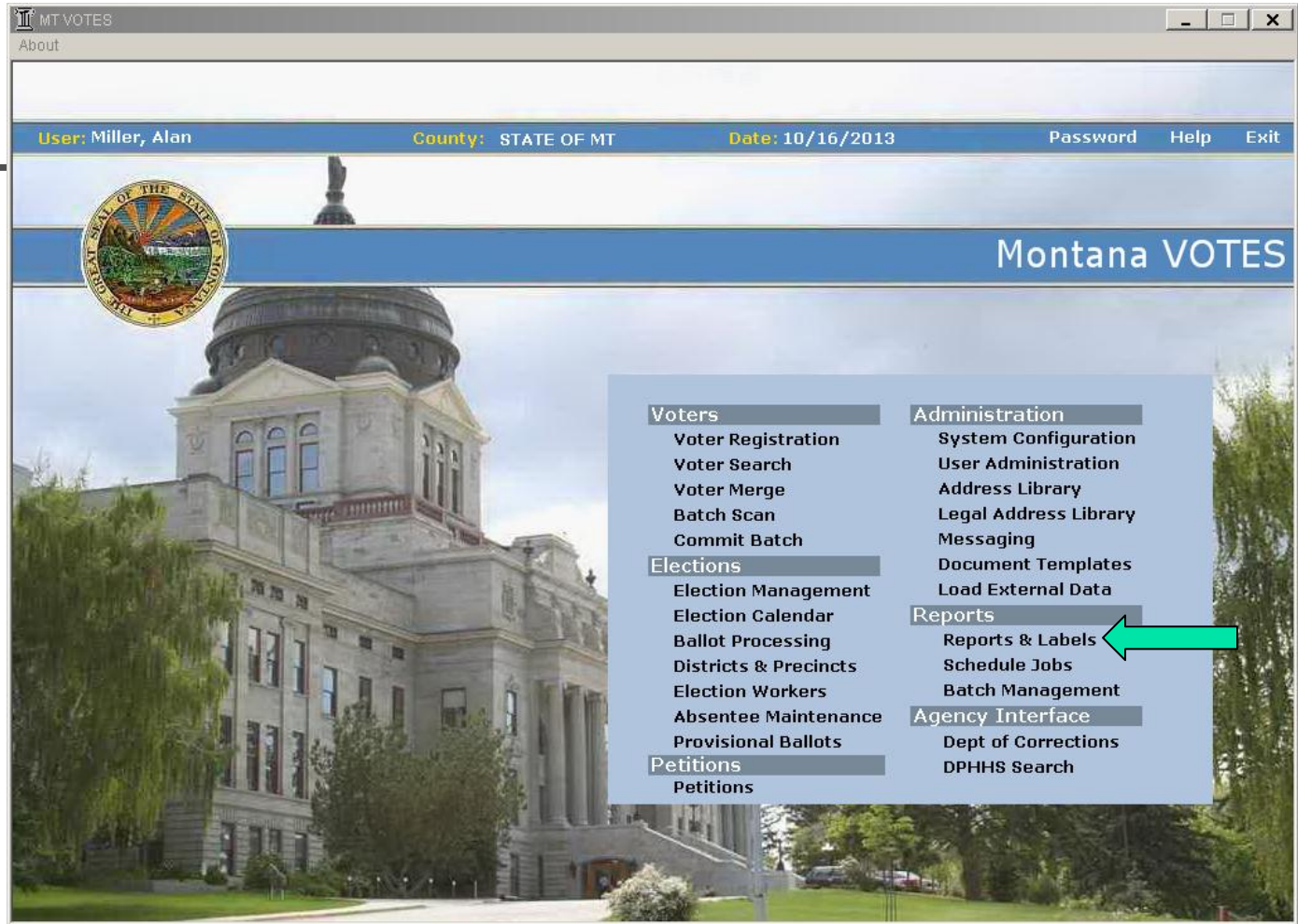
- When you receive petitions, keep them in the order that you receive them.
  1. An exception is when you receive petitions and need to separate out certain submittals due to issues with the attached affidavits.
- In MT Votes, be sure to process as one submittal each petition sheet or section of up to 25 sheets submitted with one affidavit.
  1. When you come to a new affidavit, even from the same signature gatherer, process it as a new submittal.

# Certifying Petitions to Secretary of State



- Complete and send PM-009 petition certification report to the SOS. (See screen shots that follow this slide).
- Remember to send PM-009 reports and the original certified statewide signed petitions with original affidavits to the Secretary of State's office by **certified** mail within 4 weeks of your receipt of them.
- Before you send the original signed petitions, affidavits of signature gatherers and your certification(s), you **must** make copies to keep in your office.

# PM-009 Petition Certification Reports



- **To print the PM-009 certification of petitions, go to Reports and Labels in Montana VOTES.**

# PM-009 Petition Certification Reports (continued)

The screenshot shows the 'Reports' window of the PM-009 Petition Certification Reports software. The interface includes a left sidebar with navigation links, a main form area with various input fields and a list of reports, and a bottom section with buttons for file operations and running the report. Six red arrows with numbers 1 through 6 point to specific elements: 1st points to the 'Petitions' link in the sidebar; 2nd points to the 'PM-009 Petition Certification - Statistics by House District' report in the list; 3rd points to the 'Petition Type' dropdown menu; 4th points to the 'Petition Name' dropdown menu; 5th points to the 'Petition Submittals' checkbox area; and 6th points to the 'Run Report' button.

**1st** [Petitions](#)

**2nd** PM-009 Petition Certification - Statistics by House District

**3rd** Petition Type

**4th** Petition Name

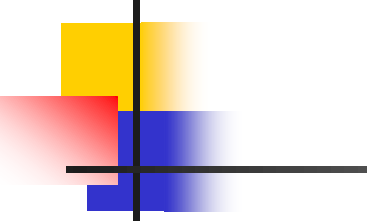
**5th** Petition Submittals

**6th** Run Report

CODE	NAME
PM-003	Petition Processing Statistics
PM-004	Petitions
PM-005	Petition Signers
PM-006	Petition Signature Statistics
PM-007	Petition Summary Results Verification
PM-008	Petition Signature Page Line Statistics
PM-009	Petition Certification - Statistics by House District
PM-010	Duplicate/Triplicate Signature For Petition
PM-011	Petition Signers / Changed Counties
PM-012	Unfinished Submittals

- In Reports and Labels, Click on "Petitions," then PM-009 Report, then choose the Petition Type and Petition Name. Next, choose the submittals. Then click "Run Report."

# PM-009 Petition Certification Reports (continued)



County: Beaverhead User Name : Miller, Alan		Petition Certification - Statistics by House District	Date : 06/16/2011 Report No. : PM-009
To the Honorable Secretary of State of the State of Montana:			
I, _____, Election Administrator, of the County of STATE OF MT., certify that I have examined the attached _____ sheets of the petition <b>Constitutional Initiative No. 106</b> in the manner prescribed by law and I believe that			
<hr/>			
<b><u>Petition Summary:</u></b>			
HouseDistrict No :		Total :	0
		Grand Total :	0
<hr/>			
HouseDistrict No :		Total :	0
		Grand Total :	0
signatures are valid; and I further certify that the affidavit of the circulator of the (sheet) (section) of the petition is attached and the post office address, residence address, or telephone number is completed for each valid signature.			
Date signed : _____			
		Signature	Title

Don't forget  
to sign and  
date it and  
put the  
county seal  
on it!

- Send the above PM-009 Report, attached to original petitions and original affidavits of signature gatherers, to Secretary of State by certified mail.
- Remember to fill out and sign the above PM-009 report, affix the county seal, and make and keep a copy of the certifications, signed petitions and affidavits!



# Where to Send Certified Petitions

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- Send original petition sheets, original affidavits and the original PM-009 Certification Report by certified mail to:

Secretary of State

Attn: Alan Miller

PO Box 202801

Helena, MT 59620-2801





# For Petition Questions

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- If you are not sure of the answer to a **statewide** petition question, email [soselections@mt.gov](mailto:soselections@mt.gov) or call (406) 444-5346.
- For a **local** petition, refer to 7-5-101 through 7-5-140, MCA, and ask your city or county attorney for assistance. If they do not know the answer or are unsure, have them call our office's legal counsel at (406) 444-5375.